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1.0 Overview

The Office of Student Financial Assistance (SFA) is the organization within the Department of Education responsible for managing and administering Title IV student financial assistance programs under the Higher Education Act of 1965. These programs include the Federal Pell Grant program, the Federal Direct Loan program, and Campus-Based programs (Perkins Loans, Federal Supplemental Educational Opportunity Grants, and Federal Work-Study).

Under the Higher Education Amendments of 1998, SFA was designated as a Performance Based Organization (PBO) with the goals to increase customer satisfaction, reduce costs, and increase employee satisfaction.

As part of the effort to modernize this office and achieve the goals stated above, SFA created SFA University. SFA University has primary responsibility for providing best in business learning services through creating and disseminating learning materials and programs and locating vendor/contractor programs that target SFA employees and partners. SFA University is tasked with providing the architecture to maintain all SFA learning products and for communicating the learning products and services available to SFA staff (Internal Customers) and schools (External Customers).

Need for the LMS

A Learning Management System (LMS) will support the administration, delivery and integration of training throughout SFA. The LMS is the critical component in SFA University's strategy to improve the delivery of training services to SFA employees and external customers. When implemented, customers will be able to access targeted learning more accurately and more quickly while enabling SFA to deliver these services in a proactive manner with greater consistency and efficiency.

Integration with Jamcracker

Jamcracker is providing the web services delivery platform for SFA. It is the intent of SFA to have the LMS integrate with the Jamcracker platform. This platform is the mechanism for delivering, managing, monitoring, and integrating the various web services that make up the web-services solution for SFA. The platform provides a single source for managing users, for security, for provisioning, and reporting. Through a single sign-on, users access all of the services for which access rights are enabled. In addition, Jamcracker offers level 1 and level 2 support to SFA users on all of the services accessed through the Jamcracker platform.

Audience Information

This section provides information on the audience size and make-up, as well as the different types of training events offered by SFA.

- Internal audiences consist of 900-1200 SFA staff. Members of this audience group would need full LMS functionality.
- External audiences consist of financial aid professionals, high school counselors, third party software developers, and operating partners. This audience consists of 5,000 to 20,000 people. Members of this audience group would need to be able to register for different learning events throughout the year, but would not need full time access or full functionality.
- Learning events include instructor led training, computer based training, and conferences.
- Audiences who register for conferences will not have pre-identified user names.

2.0 CONTACT INFORMATION

Please send your email and paper response to this packet to the Modernization Partner by 5pm on July 3, 2001 at the following address:

Sue Gottlieb
Accenture
Aerospace Building Suite 100
901 D St. SW
Washington DC, 20202
Email: susan.e.gottlieb@accenture.com

Please provide a person that will serve as the primary contact to the Modernization Partner for questions regarding your response to this packet.

Name	
Title	
Address	
Phone	
Email	

If you would like to provide additional contacts, please feel free to do so in the space below.

Name	
Title	
Address	
Phone	
Email	

Name	
Title	
Address	
Phone	
Email	

3.0 REQUIREMENTS

Please complete the questions in each section.

3.1 Functional Requirements

Functional Requirement	Description
Registration	<i>The ability to register users for courses and conferences.</i>

Questions on Registration Requirements

Does the LMS have the ability to provide online self-registration for instructor led training, conferences, and CBTs?

Does the LMS have the ability to register groups?

Does the LMS have the ability to generate registration confirmations via email?

Does the LMS have the ability to generate reminder notifications prior to the course via email?

Does the LMS have the ability to generate notification of class changes via email?

Does the LMS have the ability to enforce a registration cutoff time?

Does the LMS provide the ability to approve/disapprove a student for a course?

Does the LMS have the ability to generate an approval notification via email?

Does the LMS allow for a “wait list” to be generated?

Does the LMS allow for cancellation of a class?

Does the LMS have the ability to generate cancellation confirmation via email?

Does the LMS have the ability to enforce a cancellation (by student) cutoff time?

Does the LMS have the ability to set minimum and maximum enrollment limits?

Does the LMS have the ability to track attendance?

Does the LMS have the ability to print nametags and table tents based on the class roster?

Does the LMS allow the scheduling of courses for non-contiguous days?

Functional Requirement	Description
Course Catalog	<i>The ability to manage courses through a course catalog.</i>

Questions on Course Catalog Requirements

Does the LMS provide an online catalog with schedule and course descriptions?

Does the LMS provide the ability to search the catalog based on key words?

Does the LMS have the ability sort and filter the catalog to build a curriculum for a student, a group, or a subgroup of students?

Describe the standard fields in the course catalog?

Does the LMS have the ability to set course prerequisites (required and recommended) within a curriculum?

Does the LMS have the ability to limit access to certain courses based on defined curriculums or user groups?

Does the LMS allow the user to search external databases, such as the USDA graduate school and universities, for courses that are not listed in the LMS course catalog?

Functional Requirement	Description
Skills and Curriculum Management	<i>The ability to associate training with skills and competencies and group courses into predefined curriculums.</i>

Questions on Skills and Curriculum Management Requirements

Does the LMS have the ability to record skills or competencies?

Does the LMS have the ability to link competencies to courses and tests?

Does the LMS have the ability to recommend training based on skill set evaluation and/or predefined guidelines?

Does the LMS have the ability to group courses into curriculums for specific user groups?

Does the LMS have the ability to allow a supervisor to recommend a curriculum?

Can specific features and functions be enabled by a curriculum or user group?

Functional Requirement	Description
Reporting	<i>The ability to provide standard and custom reports.</i>

Questions on Reporting Requirements

Please provide a list of the standard reports generated by the LMS.

Specifically, does the LMS provide the following reports:

- enrollment information
- registration information
- student attendance
- satisfaction survey results
- individual training histories

Can reports be exported to other applications?

Can custom reports be created in the LMS?

Does the LMS provide the ability for courses to be archived as they are updated so that report information can be retrieved? Ex. When a course's content changes, the previous versions are separate and can still be accessed.

Functional Requirement	Description
Course Delivery	<i>The ability to manage the delivery of electronic and non-electronic training.</i>

Questions on Course Delivery Requirements

Does the LMS have the ability to store and launch CBTs?

Does the LMS allow a student to bookmark and exit a course to return later at the same point in course?

Does the LMS have the ability to score a test/evaluation online?

Does the LMS have the ability to print certificates once notification that a student has completed a course is received (automatic notification for CBT, manual notification for Instructor Led Training)?

Does the LMS have general subject CBTs integrated into the platform, either through your own company's products and services or a third party provider? (ex. project management, desktop software tutorials) If yes, please attach a catalogue of titles.

Functional Requirement	Description
Feedback and Surveys	<i>The ability to support the training evaluation process.</i>

Questions on Feedback and Survey Requirements

What training evaluation functionality is provided by the LMS?

Does the LMS support the creation and management of surveys independent of a course?

What standard surveys are included?

Functional Requirement	Description
User Support	<i>Support that is provided by the system to ensure ease of use.</i>

Questions on User Support Requirements

Does the LMS provide online help?

Is an online tutorial provided?

What training does your organization provide and/or recommend during implementation of the LMS?

Functional Requirement	Description
Configuration	<i>Requirements for commonly configured items.</i>

Questions on Configuration Requirements

Does the LMS provide a customizable user interface with the ability to brand all pages?

Can specific fields be removed or created?

3.2 Technical Requirements

Technical Requirement	Description
Technical Standards	<i>Requirements detailing the technical standards to which the LMS will comply.</i>

Questions on technical standards.

Do you offer a hosted version of your software? Who are your hosting partners?

Is your software a 1-1 architecture or multi-tenant?

Is your software web-based or client-server? If web-based, is there any client-side implication such as Java applets or Citrix clients?

Which operating systems and browsers do you run on? What is the recommended connection?

What API's do you have available? Please specify if your API's include add user, modify user, set-up company, modify company.

Do you own all of the source code of the application? If not, what are the conditions of your license?

Which technology do you use to create web pages?

Does the LMS provide the ability to efficiently insert Meta tags into all web pages of the LMS?

Is the LMS compatible with MAPI email system (a Microsoft standard)?

Does the LMS support standard RDBMS, such as Oracle 7.0?

Does the LMS support an Oracle database?

Does the LMS track and provide proof of compliance with ISO9000?

Is the LMS compatible with TCP/IP?

Does the LMS require a web browser only (no plug-ins, IE 4.01 or Netscape 4.0 minimum)?

Does the LMS provide an interface consistent with MS Windows?

Is the LMS JDBC compliant?

Is the LMS ODBC compliant?

Does the LMS provide a database structure using Microsoft SOAP standards for XML?

Does the LMS store all data in central database?

Does the LMS provide the ability to batch-load data?

Does the LMS utilize modular architecture?

Does the LMS allow content driven by user provisioning via an aggregator?

Is the LMS AICC compliant?

Is the LMS SCORM compliant?

Is the LMS IMS compliant?

Technical Requirement	Description
Security	<i>Requirements detailing secure access.</i>

Questions about Security Requirements.

Which security technologies do you use? What firewall technologies? What are the physical security processes in place?

Does the LMS provide multiple levels of administrative access?

Does the LMS determine user access levels by user ID and password?

Is the user ID and password standardized (i.e. email address) or user defined?

Does the LMS maintain security authorization level audit trails of who entered the data and when?

Technical Requirement	Description
Technical Support	<i>Recommended and required support to ensure functionality</i>

Where are your support centers? What are the hours and access points? How are your support centers staffed?

Describe your technical support severity levels and escalation process.

What is your uptime SLA's? How do you achieve with back-up and recovery and mission critical operations?

Technical Requirement	Description
Change Management	<i>Maintenance and upgrade support.</i>

How often do you perform software upgrades and maintenance windows? Are all customers migrated to new versions at the same time? What is the customer notification process?

How many releases do you deliver per year? What is your development cycle? What is the customer notification process?

Technical Requirement	Description
508 Accessibility	<i>Requirements detailing access for people with disabilities.</i>

Under Section 508 (29 U.S.C. § 794d) of The Rehabilitation Act of 1973, agencies must give disabled employees and members of the public access to electronic and information technology (EIT) that is comparable to the access available to others. The law applies to all Federal agencies when they develop, procure, maintain, or use electronic and information technology. Attached to this document is a list of accessibility requirements developed by the Department of Education. Please review the document and answer the questions below.

Questions about 508 Accessibility Requirements.

Is your organization aware of the Section 508 Accessibility Requirements?

Is the LMS compliant with the 508 requirements?

What steps have been taken to test the LMS for compliance with the requirements? If none, describe what steps will be taken in the future to test for compliance and what the expected timeframe is.

Have any of your implementations required the software to be 508 compliant?

4.0 ADDITIONAL INFORMATION

Please provide information concerning the financial standing of the company, customer base, and implementation experience.

4.1 General Questions

1. Please provide a copy of your most recent annual report (if available). Describe your sales and earnings trends over the last 5 years.
2. Please describe the organization's competitive advantage versus its competitors.
3. How many implementations of the LMS are currently in place? Are any of the implementations for a federal government agency?
4. Please provide us with at least three customer references. Include contact information and a brief description of services provided. If possible, please provide us with one reference from an implementation at a federal government agency.
5. Please provide your proposed implementation plan, including tasks, timeframes, quality assurance plan, and level of effort. Include a two-phased approach, in which core functionality is delivered in phase one with customizations and extended functionality to follow in phase two.

4.2 Costs

Please provide specific costs for the LMS. Please provide costs based on ranges of numbers of users. Please describe and itemize the costs for the items below.

- Licensing
- Maintenance
- Hosting
- Implementation and integration effort (phase one and phase two)
- Training
- Other services provided

If you provide integrated CBTs, please provide costs with the CBTs and without CBTs.

If the LMS is integrated with virtual classroom/collaborative work tools, please provide costs with the integration and without the integration.

Please provide costs that include hosting, as well as costs without hosting.

Please attach your standard license and payment terms and your standard Service Level Agreement.